Information Organization, Usability, Currency & Accessibility (IOUCA)
Meeting Minutes

Date: May 23, 2006
Time: 9:00 – 11:00 a.m.
Location: LC II, Room 340

Attendees:

☒ Neal Albritton (DOR)	☒ Shayn Anderson (EDD)	☒ Steve Branson (DHS)
☒ Steve Clemons (CEAP)	☒ Donna Freeman (FTB)	☐ Theresa Giles (DHS)
☒ Jennifer Harper (DHS)	☒ Jeff Hillard (CDFA)	☒ John Jewell (CSL)
☒ Patrick Johnson (DOR)	☐ Anamarie Malone (DTS)	☒ Liz Mechem (Insurance)
☒ Claudina Nevis (SCIO)	☐ Sally Nietering (POST)	☐ Joni Ogata (DMHC)
☒ Kristine Ogilvie (CSL)	☐ Bill Passavant (DSS)	☐ Rob Quigley (SCIO)
☐ John Quijada (DMV)	☐ Deborah Schwartz (CRB)	☒ Morris Weisbart (CDFA)

HFI Kickoff   **John Jewell**

The HFI contract will last 4-6 weeks or 2 months. HFI has provided copies of their book The Institutionalization of Usability; the book is also available on Safari. They are excited to work with the IOUCA on how to make web usability part of the process rather than an add-on. CEAP raised the issue of getting information; their intention is to link the enterprise with tools and training.

Portal Review Board Meeting   **John Jewell/Kris Ogilvie**

There are two more meetings before the next Review Board Meeting. Next Tuesday, the team will need to determine what will be ready to go forward with. Accessibility and usability should be broken into parts. Usability will need to look at HFI's timeframe; they may wish to validate some recommendations with HFI. CSS will be broken into parts. Work groups should focus first on the recommendation, then on the business case.

IOUCA can note to the Review Board that the process used by FTB to design their site and develop their templates is recommended by the IOUCA. We commend FTB on bringing usability to state government.

Templates: Recommendation vs. Evaluation   **Kris Ogilvie**

A decision was postponed until next meeting.

Web Accessibility Training   **Neal Albritton**

The team needs to review the workbook by Design Media. The workshops will be announced this week. An invitation has been sent.

Working Group Teams   **Debbie Schwartz**

The group needs to discuss how to put forward the templates and the findings. It was agreed that templates must access style sheets and must be Section 508 compliant. The issue of enterprise branding vs. topical needs to be addressed. Evaluation will rely on the completion of other studies the state is working on.

IT Forum   **Kris Ogilvie**

It was suggested that IOUCA consider using the IT Forum for communication. It is still under discussion and will be placed on the agenda for next week.

Action Items   **Debbie Schwartz**

ACTION: Draft usability standards, guidelines, and best practices.

> *Assigned To: Donna Freeman*
>
> *Due: May 30, 2006*
>
> *Update: In progress*

ACTION: Develop a list of file types and versions that should be used for California web pages. The list should be prioritized by most desirable and focused on where we want to be in the future rather than where we are now.

> *Assigned To: Neal Albritton, Steve Branson, Steve Clemons*
>
> *Due: May 30, 2006 (Update)*
>
> *Update: Meeting with Adobe scheduled May 25, 2006.*

ACTION: Provide a recommendation regarding IOUCA's use of the Webmaster's IT Forum and an FAQ posting on the State CIO's website (see Issue #5).

> *Assigned To: Steve Branson*
>
> *Due: May 30, 2006 (Update)*
>
> *Update: In progress.*

ACTION: Develop a beginner's version of the workbook.

> *Assigned To: Neal Albritton*
>
> *Due: May 30, 2006 (Update)*
>
> *Update: In progress*

ACTION: Discuss a process for disseminating information to content providers and webmasters quickly. Prepare a plan to establish ongoing communication with webmasters.

> *Assigned To: John Jewell and Rick Vagg*
>
> *Due: May 30, 2006 (Update)*
>
> *Update: In progress.*

ACTION: Follow up on the feasibility of using GTC, Executive Institute, and CIO Academy as vehicles for ongoing training.

> *Assigned To: Claudina Nevis and Liz Mecham*
>
> *Due: May 30, 2006 (Update)*
>
> *Update: In progress. Claudina is discussing the issue.*

Parking Lot   **Debbie Schwartz**

1. *Frame the issue of application accessibility and usability.*

   Assigned To: Steve Clemons

   Due: April 18, 2006 (Update)

   Update: It was agreed that these two action items are outside the scope of the IOUCA working group. We agreed that it was something we should be aware of. It was suggested that the two items be put in the parking lot for the time being and revisited in about a month.

2. *Conduct high level research and frame the issue of accessibility and usability in regards to online forms.*
   Assigned To*: Steve Clemons*
   Due*: April 18, 2006 (Update)*
   Update*: See above.*

3. *Content authors may benefit from training and instruction in writing for the web. There is a need for training for content developers. It may be beneficial if the IOUCA could identify these training needs. DHS offers web author training for readability, usability, and targeting information to the specific audience.*

4. *What pages will be impacted by the standards (e.g., .ca.gov, .org, .com)? How do we define what constitutes a state web page? What about departments that provide content on non-ca.gov websites?*

Next Steps   **Kris Ogilvie, Debbie Schwartz**

Next IOUCA Meeting: May 30, 2006
                              Library & Courts II, 900 N Street, Room 340
                              9:00 – 11:00 a.m.

Open Issues   **Debbie Schwartz**

1. How can the state design templates for current technology standards while accommodating departments with a wide range of expertise and software tools?
   The Review Board noted that some content management solutions can resolve this issue, but not all departments have strong content management systems in place. DTS is considering offering support. It was recommended at the IOUCA meeting on March 14th that we consider offering a resource gallery of images that can be used by any state department. It would be possible to offer a suite of templates using different color palettes that meet accessibility requirements. Before this can be decided, the issue of single look-and-feel for all California pages vs. multiple look-and-feel with common branding needs to be resolved at a higher policy level.

2. How can California enforce the standards after adoption? ***How will California ensure the application of standards across departments and over time (quality assurance)?[added 5/2]*** *California will likely approach adoption from an incentive perspective rather than an enforcement perspective. An exception is Section 508 compliance, which is mandated by state and federal law.*

3. Should tools to implement standards (CSS, templates) be developed for current look and feel as well as new look and feels?

4. Guidelines are not always followed. Would it be better to develop standards only, but drive by level of compliance? For example,
   - Level 1 Standards: Minimal accessibility
   - Level 2 Standards: Moderate accessibility
   - Level 3 Standards: High accessibility

Departments could be encouraged to work toward improving their websites by qualifying for higher levels. The state could provide "paths to accessibility" and could provide training for each level.

5. What skill sets will be needed to communicate, maintain, and implement the standards, guidelines, and tools the IOUCA is recommending?

6. How do we separate content from HTML (CSS only separates content from presentation)?

    This can be done through master templates in Dreamweaver, content management systems, or hard coding. The team needs to determine if this is part of our scope.